

DATE: _____

PHONE(s): Home: _____

Work: _____

Legal Assistance Office: 256-876-9005

WILL INFORMATION SHEET*If you have any questions, leave section blank and discuss with Legal Assistance Attorney*1. NAME: _____
(first) (middle) (last)

2. FULL ADDRESS: _____

3. STATE OF LEGAL RESIDENCE: _____ CURRENTLY IN _____

4. MARITAL STATUS (circle one): Married Single Divorced Widowed

5. SPOUSE'S NAME: _____
(first) (middle) (last)6. LIST CHILDREN (natural-born, adopted or stepchildren) *IF THEY ARE TO BE BENEFICIARIES:*

Full Name: _____ Age: _____ Relationship: _____

Full Name: _____ Age: _____ Relationship: _____

Full Name: _____ Age: _____ Relationship: _____

Full Name: _____ Age: _____ Relationship: _____

Full Name: _____ Age: _____ Relationship: _____

Specifically include mention of: _____ adopted children _____ stepchildren in definition of "children."

7. STATUS (circle one): Active Duty Spouse/AD Retired Military Spouse/RM DoD Civilian

8. PERSONAL REPRESENTATIVE (same as Executor or Executrix):

Primary: Name: _____ Relationship: _____

Alternate: Name: _____ Relationship: _____

9. PRIMARY BENEFICIARY:

Name: _____ Relationship: _____

ALTERNATE BENEFICIARY:

Name: _____ Relationship: _____

Name: _____ Relationship: _____

10. Per Stirpes: _____ Per Capita: _____

11. LEGAL GUARDIAN: Name: _____ Relationship: _____

Address (city and state): _____

ALTERNATE GUARDIAN:

Name: _____ Relationship: _____

Address (city and state): _____

12. ESTIMATED VALUE OF YOUR ESTATE (including Life Insurance):

Current Inheritance Tax Exclusion: \$700,000.00 Under Over

13. WAIVE BOND: Yes No 14. WANT LETTER OF INTENT: Yes No
15. If you have MINOR CHILDREN, do you want a TRUST: Yes No UGMA
16. TRUSTEE: Name: Relationship:
Address:
ALTERNATE: Name: Relationship:
Address:
17. AGE OF DISTRIBUTION FOR TRUST OR UGMA:
18. DISPOSITION OF REMAINS: Honors Burial Cremation Scientific Research
19. NOTES (SPECIFIC REQUESTS, etc.):

COMMON QUESTIONS ARISING IN WILL PREPARATION:

What is a will?: A will is a legal document which states your desires concerning the disposition of your property after your death. A will also contains other specific directives such as who is to implement your instructions and who acts as guardian for any minor children, among other matters.

Why should I make a will?: If you die without a valid will, the distribution of your property will be governed by the laws of your state of legal residence and/or the laws of the state in which you die. Your wishes in such instances are usually NOT a factor.

Is all of my property controlled by my will when I die?: *NO.* Insurance policy proceeds are distributed as you have designated in the policy. Property which you own *jointly* with another person will (normally) go to that other joint owner.

What is probate?: Probate is the court procedure whereby your will is proven to be *valid* or *invalid*. Probate proceedings also address the administration of your estate, taxes due, guardianship of children, etc.

How do I determine my state of legal residence and what difference does it make to my will?: Your legal residence is the state which you consider (at this particular time) as your *permanent* home. If you're active duty or an active-duty family member, think of it as the place where you expect to return when you depart military service. Your legal residence is important to your will because the laws of the state of legal residence will be used in interpreting and implementing your will.

What is a Personal Representative?: The Personal Representative (or Executor) is the person you name to carry out your wishes as expressed in your will and to actually *settle* your estate. Settlement includes paying—from your estate funds—any taxes and other legal debts you may owe. *Choose this person with care and discuss the matter with him or her.* Always name a person in whom you have trust and confidence to capably fulfill the responsibility. If married, your spouse would be the prime candidate for consideration.

What is a Letter of Intent?: A Letter of Intent (or Personal Memorandum) is a *non-binding* instructional memorandum you create for your Personal Representative *outside* your will in which you request said person to honor the bequests and instructions you have stated within said Letter of Intent. It is a good way of distributing small or "sentimental" items with which you might change your mind as to recipient or which could even be lost, broken or stolen. The Letter of Intent is not appropriate for the distribution of valuable items or instructions that you want to *absolutely* happen. It is a *convenience* item and *not* legally enforceable.

LIVING WILL: ____ Yes ____ No ***HEALTH-CARE POWER OF ATTORNEY:** ____ Yes ____ No

PRIMARY ATTORNEY-IN-FACT/PROXY:

Name: _____ Telephone: _____

Full Address: _____ Relationship: _____

ALTERNATE ATTORNEY-IN-FACT/PROXY:

Name: _____ Telephone: _____

Full Address: _____ Relationship: _____

LEAVING ORGANS/TISSUES:

Transplantation: ____ Yes ____ No Educational/Scientific Purposes: ____ Yes ____ No

** In Alabama, the Living Will and Health-Care Power of Attorney are merged into one document.*

GENERAL POWER OF ATTORNEY:

Active Now: _____ -or- Springing: _____

Recipient: _____ Relationship: _____

Address (city and state): _____

Expiration Date: _____ -or- Indefinite: _____

OTHER TYPE ("Special") POWER OF ATTORNEY:

NOTE: Both "General" and "Special" Powers of Attorney may be **DURABLE**—the document simply needs to state that it is meant to be "durable."